FIG. 1

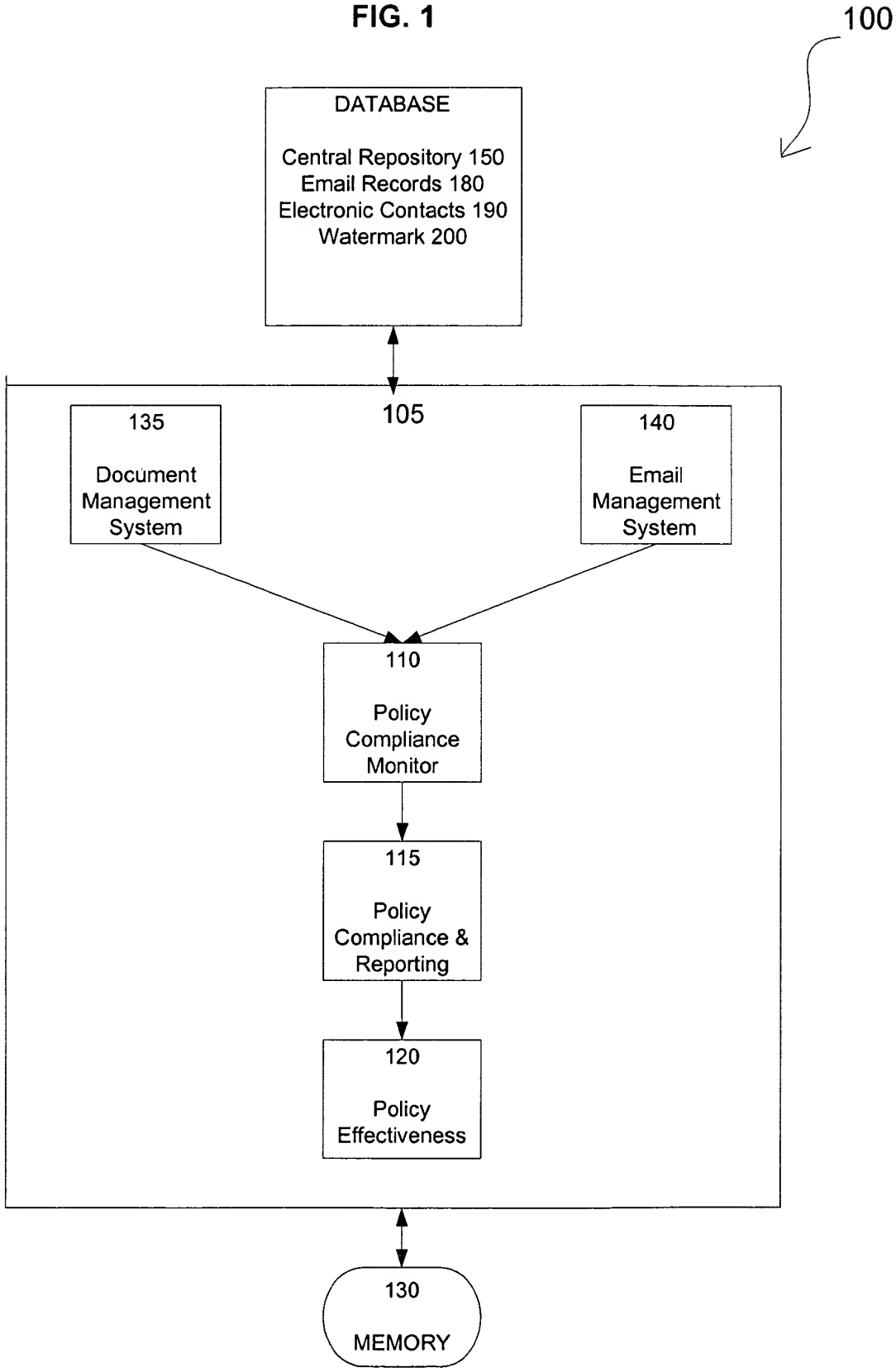

100
DATABASE
Central Repository 150
Email Records 180
Electronic Contacts 190
Watermark 200
105
135
Document Management System
140
Email Management System
110
Policy Compliance Monitor
115
Policy Compliance & Reporting
120
Policy Effectiveness
130
MEMORY

FIG. 2A

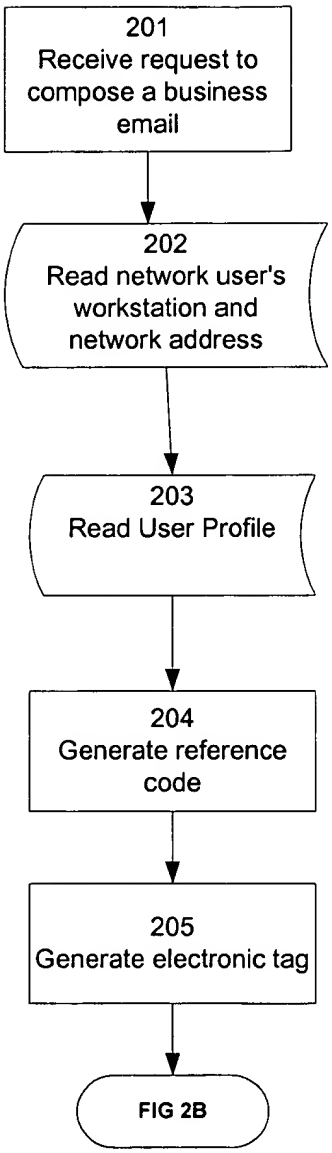

201
Receive request to compose a business email
202
Read network user's workstation and network address
203
Read User Profile
204
Generate reference code
205
Generate electronic tag
FIG 2B

FIG. 2B

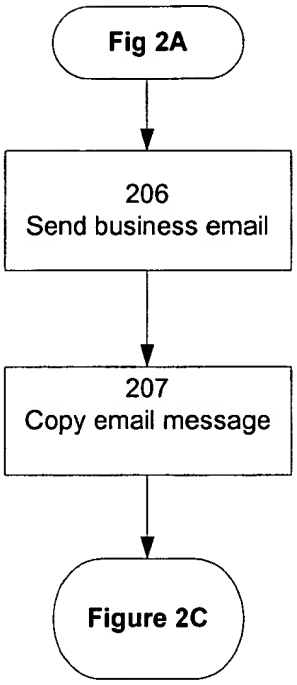


Fig 2A
206
Send business email
207
Copy email message
Figure 2C

FIG. 2C

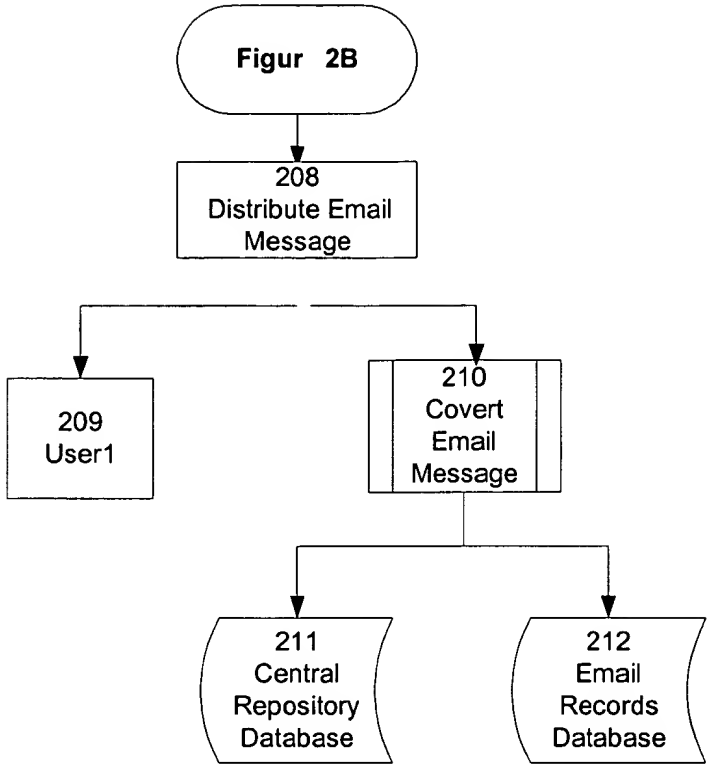

Figur 2B
208
Distribute Email
Message
209
User1
210
Covert
Email
Message
211
Central
Repository
Database
212
Email
Records
Database

Figure 3

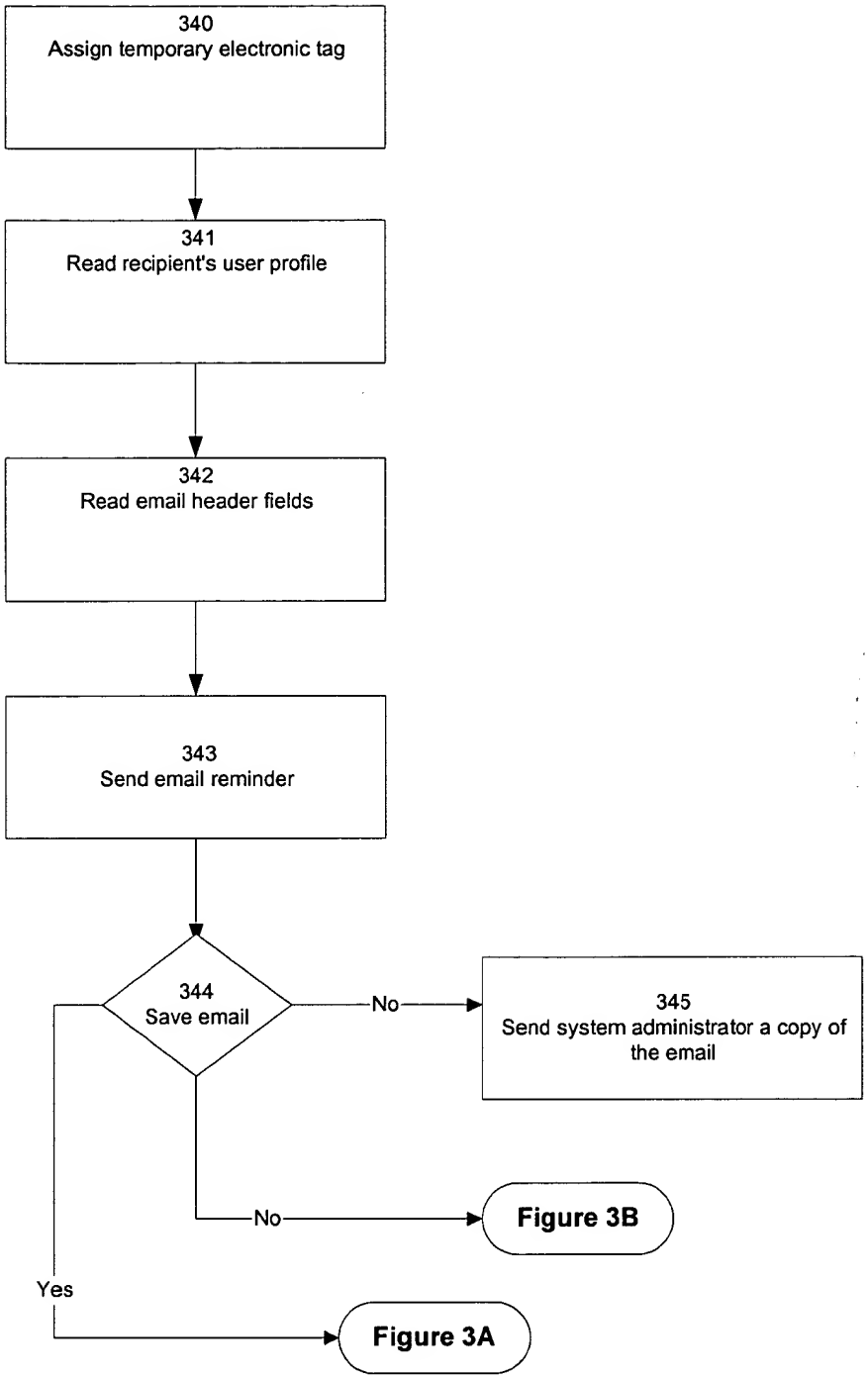
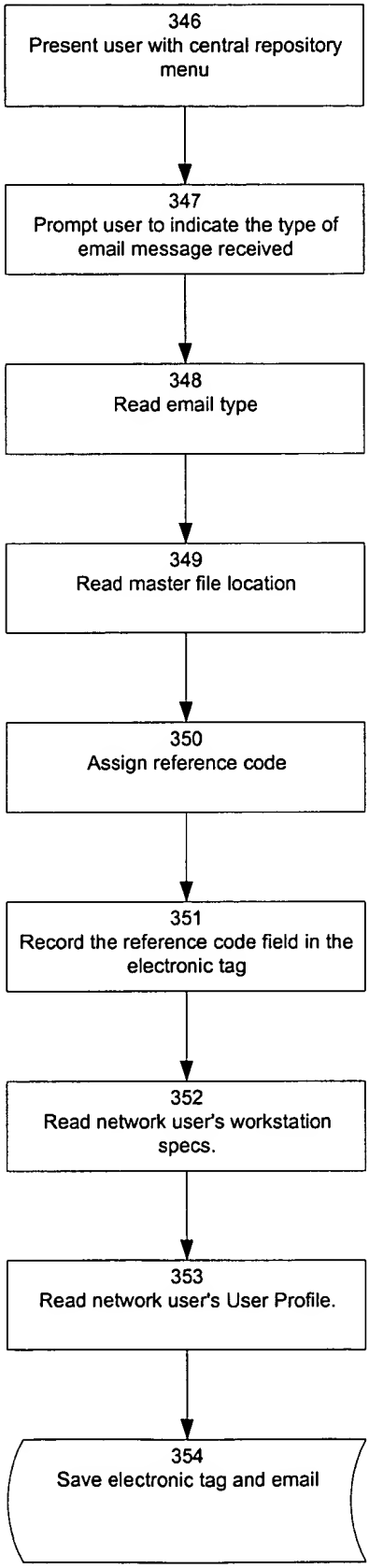

340
Assign temporary electronic tag
341
Read recipient's user profile
342
Read email header fields
343
Send email reminder
344
Save email
No
345
Send system administrator a copy of the email
No
Figure 3B
Yes
Figure 3A

Figure 3A


346
Present user with central repository menu
347
Prompt user to indicate the type of email message received
348
Read email type
349
Read master file location
350
Assign reference code
351
Record the reference code field in the electronic tag
352
Read network user's workstation specs.
353
Read network user's User Profile.
354
Save electronic tag and email

Figur 3B

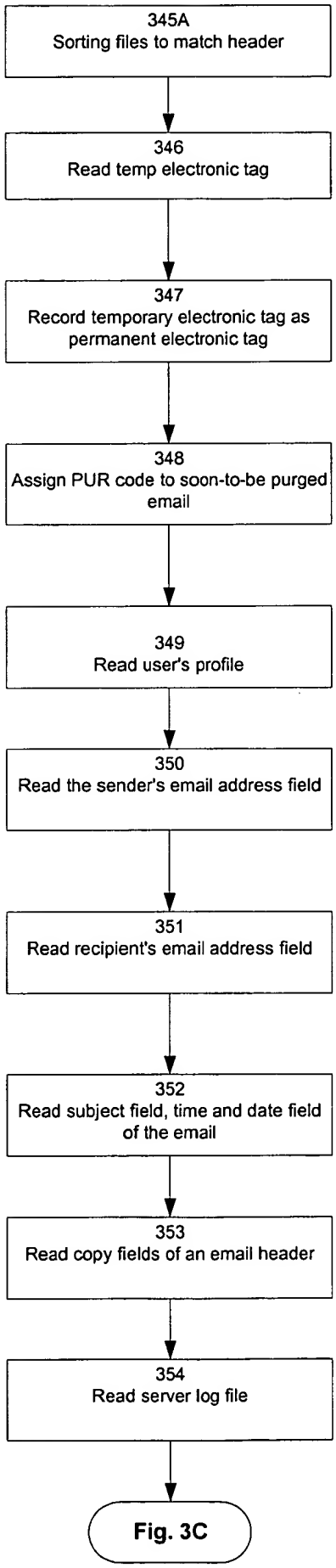


Fig. 3C

Figur 3C

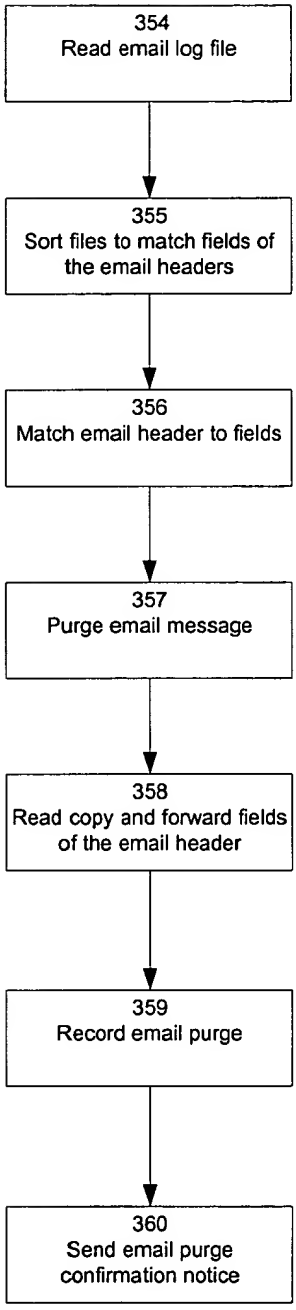

354
Read email log file
355
Sort files to match fields of the email headers
356
Match email header to fields
357
Purge email message
358
Read copy and forward fields of the email header
359
Record email purge
360
Send email purge confirmation notice

Figure 4

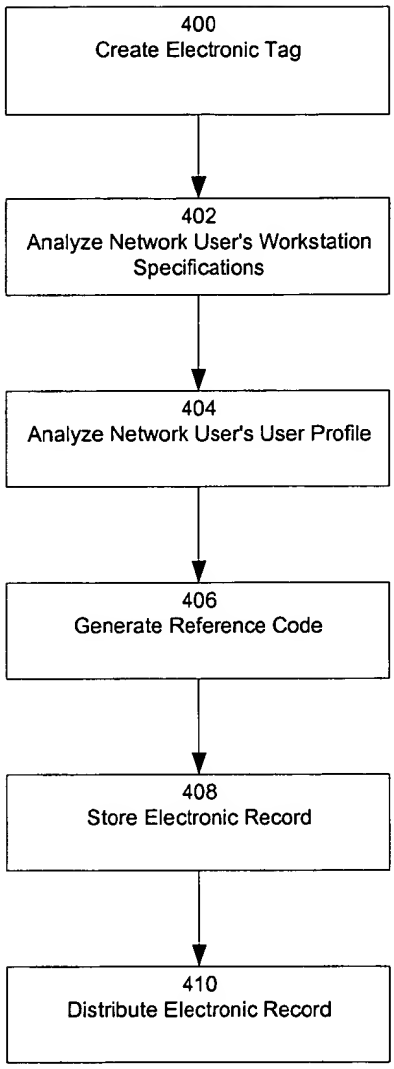

400
Create Electronic Tag
402
Analyze Network User's Workstation Specifications
404
Analyze Network User's User Profile
406
Generate Reference Code
408
Store Electronic Record
410
Distribute Electronic Record

Figure 5

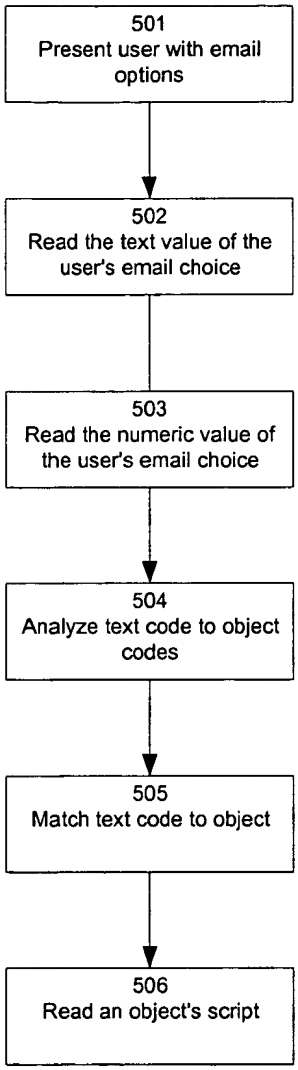

501
Present user with email options
502
Read the text value of the user's email choice
503
Read the numeric value of the user's email choice
504
Analyze text code to object codes
505
Match text code to object
506
Read an object's script

Figure 6

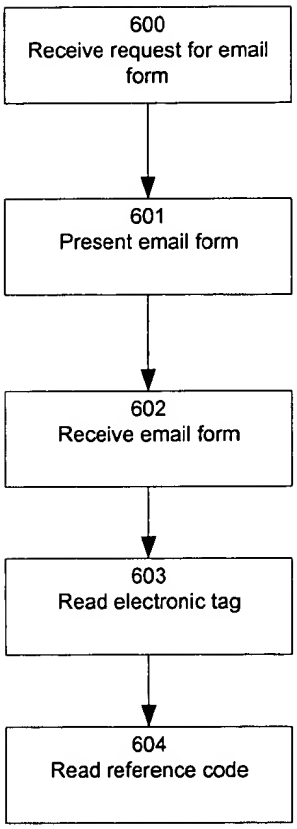

600
Receive request for email form
601
Present email form
602
Receive email form
603
Read electronic tag
604
Read reference code

Figure 6B

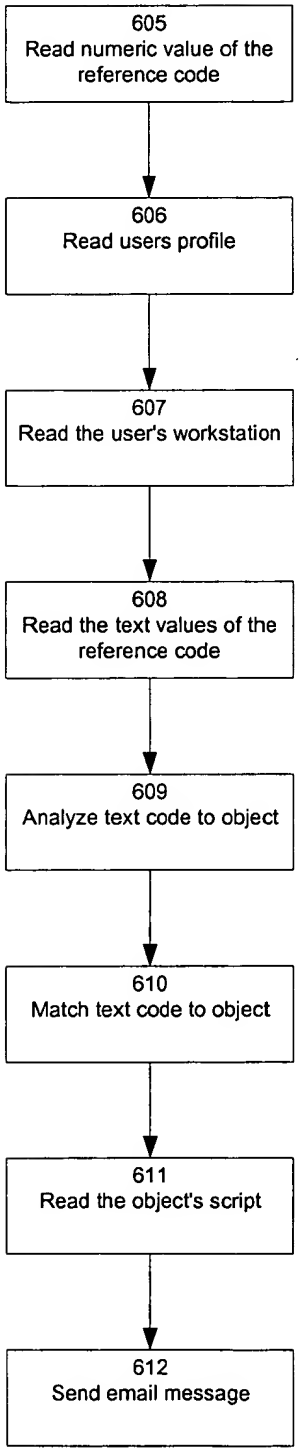

605
Read numeric value of the reference code
606
Read users profile
607
Read the user's workstation
608
Read the text values of the reference code
609
Analyze text code to object
610
Match text code to object
611
Read the object's script
612
Send email message

Figure 6C

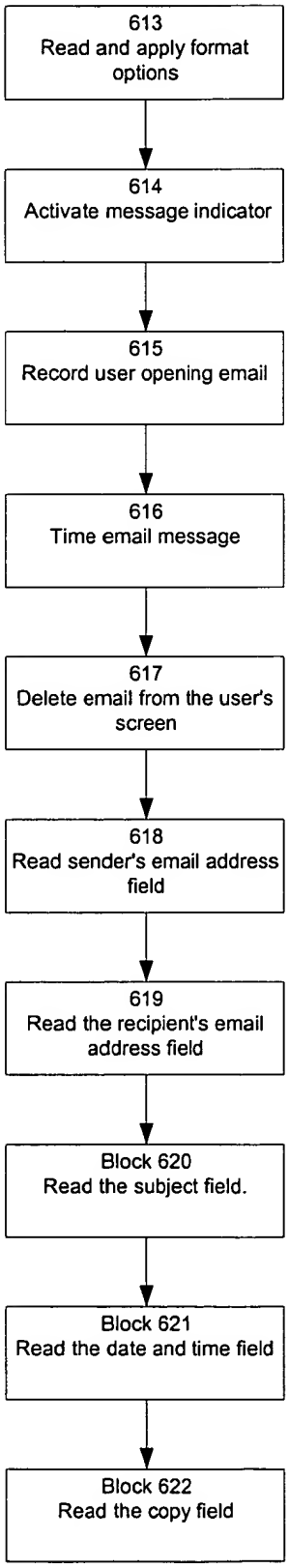

613
Read and apply format options
614
Activate message indicator
615
Record user opening email
616
Time email message
617
Delete email from the user's screen
618
Read sender's email address field
619
Read the recipient's email address field
Block 620
Read the subject field.
Block 621
Read the date and time field
Block 622
Read the copy field

Figure 6D

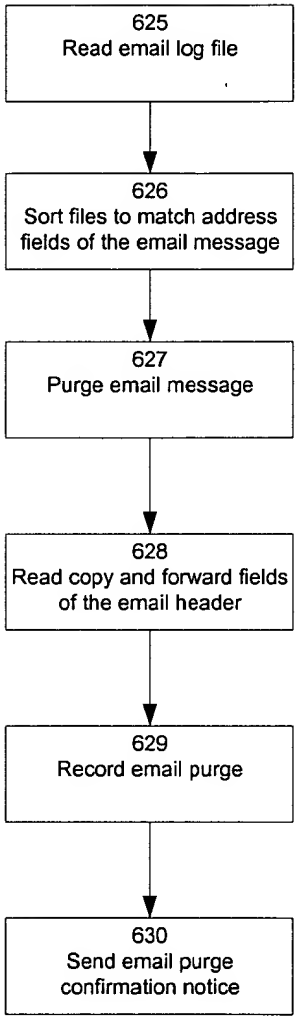

625
Read email log file
626
Sort files to match address fields of the email message
627
Purge email message
628
Read copy and forward fields of the email header
629
Record email purge
630
Send email purge confirmation notice

Figure 7

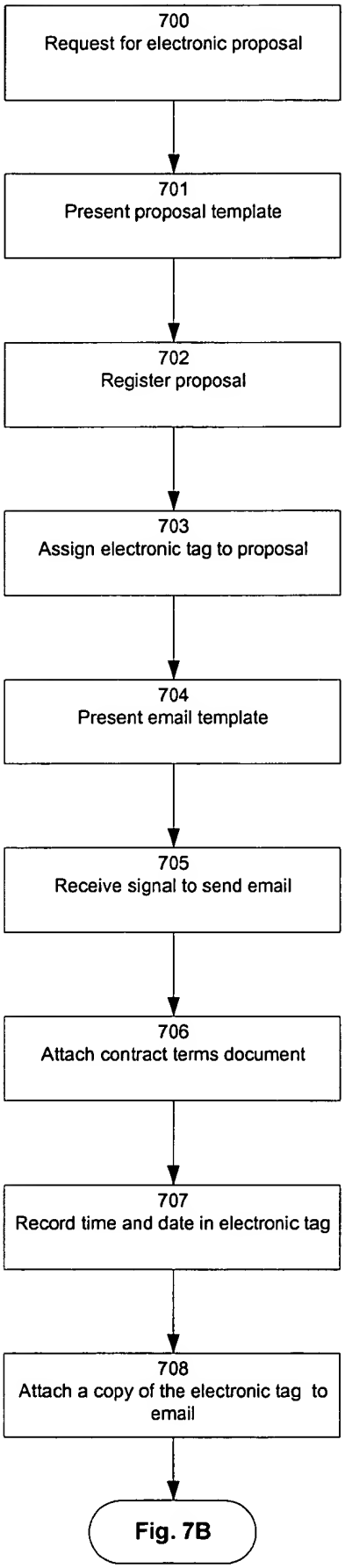


Fig. 7B

Figure 7B

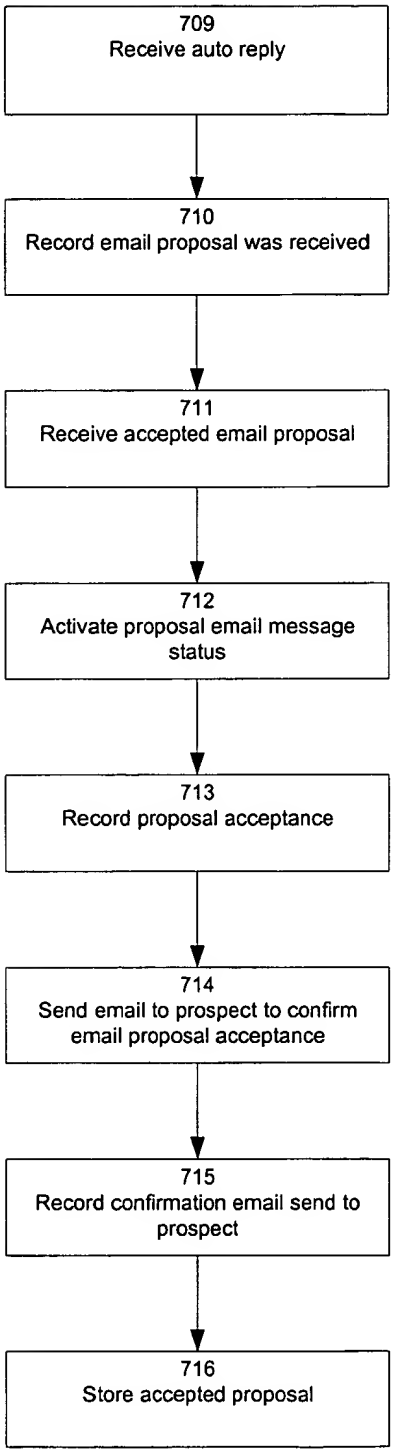

709
Receive auto reply
710
Record email proposal was received
711
Receive accepted email proposal
712
Activate proposal email message status
713
Record proposal acceptance
714
Send email to prospect to confirm email proposal acceptance
715
Record confirmation email send to prospect
716
Store accepted proposal

Figure 8A

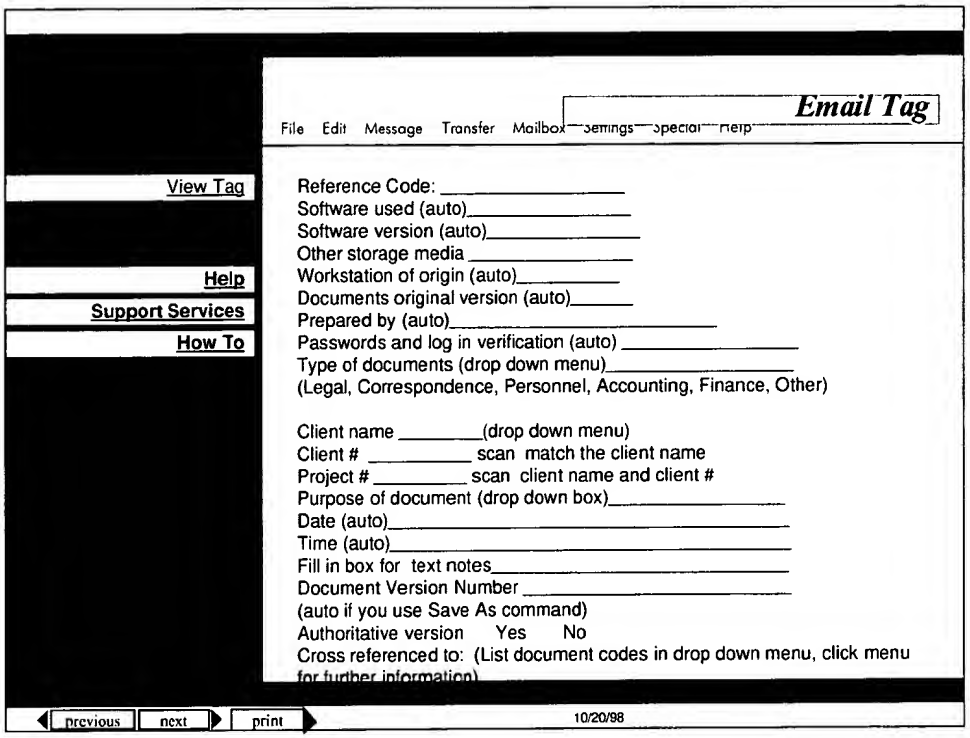

Email Tag
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Reference Code: _____
Software used (auto)_____
Software version (auto)_____
Other storage media _____
Workstation of origin (auto)_____
Documents original version (auto)_____
Prepared by (auto)_____
Passwords and log in verification (auto) _____
Type of documents (drop down menu)_____
(Legal, Correspondence, Personnel, Accounting, Finance, Other)
Client name _____(drop down menu)
Client # _____ scan match the client name
Project # _____ scan client name and client #
Purpose of document (drop down box)_____
Date (auto)_____
Time (auto)_____
Fill in box for text notes_____
Document Version Number _____
(auto if you use Save As command)
Authoritative version Yes No
Cross referenced to: (List document codes in drop down menu, click menu for further information)
previous
next
print
10/20/98

Figure 8B

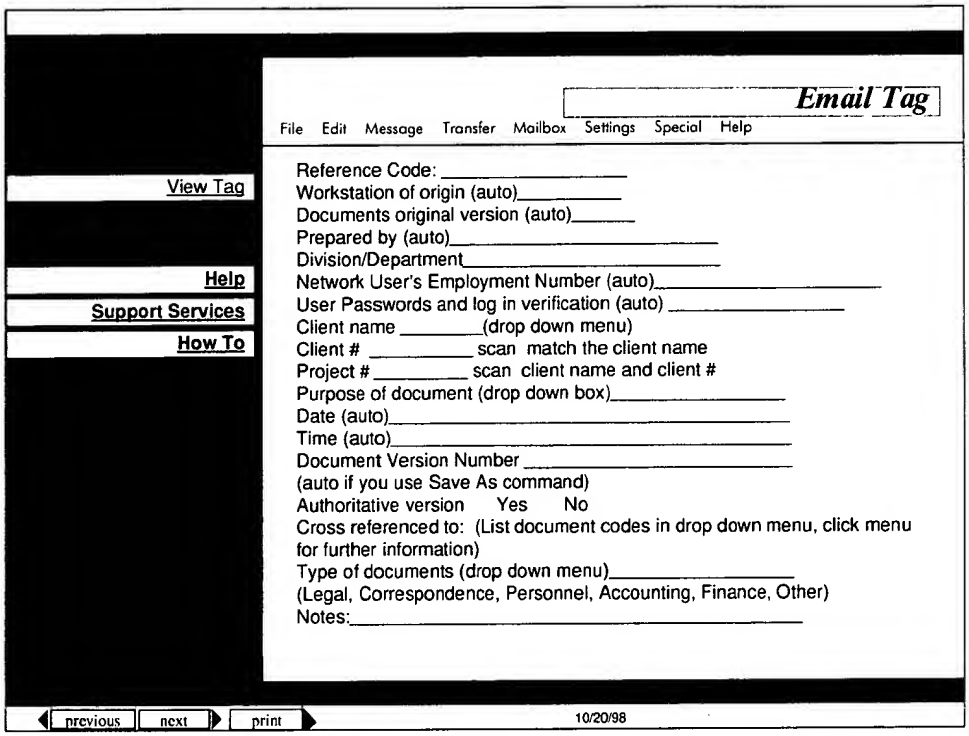

Email Tag
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Reference Code: _____
Workstation of origin (auto)_____
Documents original version (auto)_____
Prepared by (auto)_____
Division/Department_____
Network User's Employment Number (auto)_____
User Passwords and log in verification (auto) _____
Client name _____(drop down menu)
Client # _____ scan match the client name
Project # _____ scan client name and client #
Purpose of document (drop down box)_____
Date (auto)_____
Time (auto)_____
Document Version Number _____
(auto if you use Save As command)
Authoritative version Yes No
Cross referenced to: (List document codes in drop down menu, click menu for further information)
Type of documents (drop down menu)_____
(Legal, Correspondence, Personnel, Accounting, Finance, Other)
Notes:_____
previous
next
print
10/20/98

Figure 8C

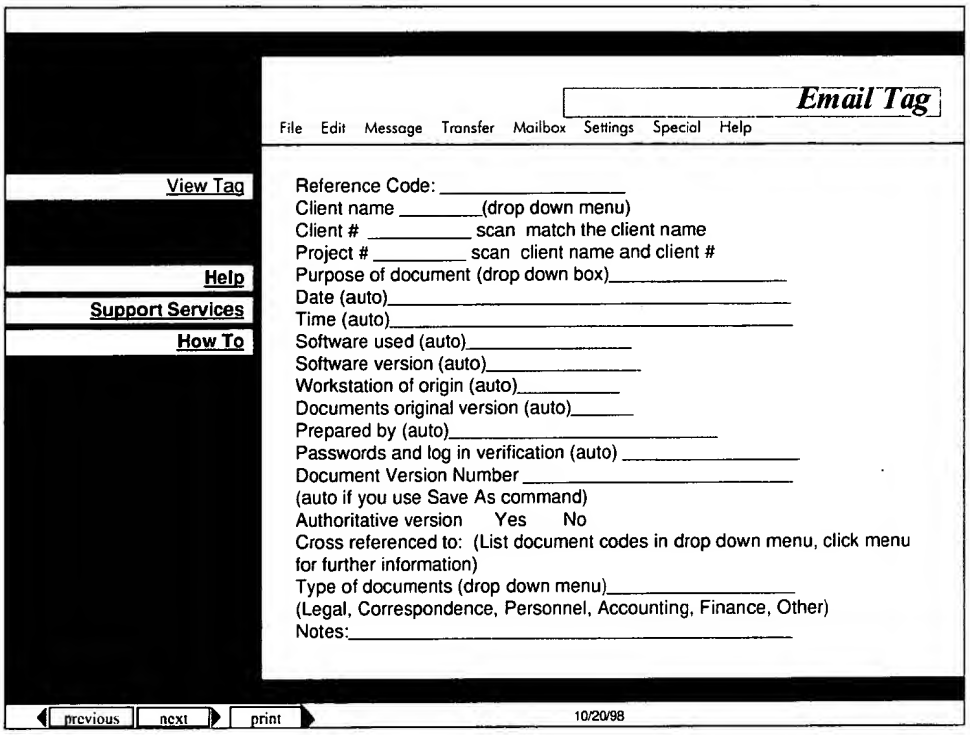

Email Tag
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Reference Code: _____
Client name _____(drop down menu)
Client # _____ scan match the client name
Project # _____ scan client name and client #
Purpose of document (drop down box)_____
Date (auto)_____
Time (auto)_____
Software used (auto)_____
Software version (auto)_____
Workstation of origin (auto)_____
Documents original version (auto)_____
Prepared by (auto)_____
Passwords and log in verification (auto) _____
Document Version Number _____
(auto if you use Save As command)
Authoritative version Yes No
Cross referenced to: (List document codes in drop down menu, click menu for further information)
Type of documents (drop down menu)_____
(Legal, Correspondence, Personnel, Accounting, Finance, Other)
Notes:_____
previous
next
print
10/20/98

Figure 9

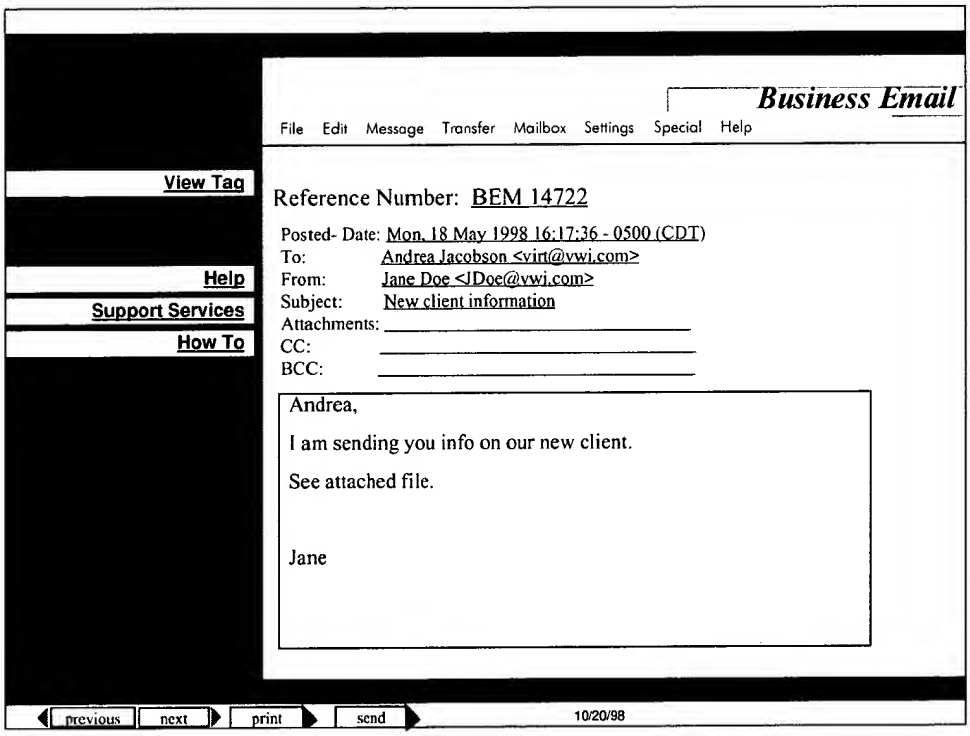
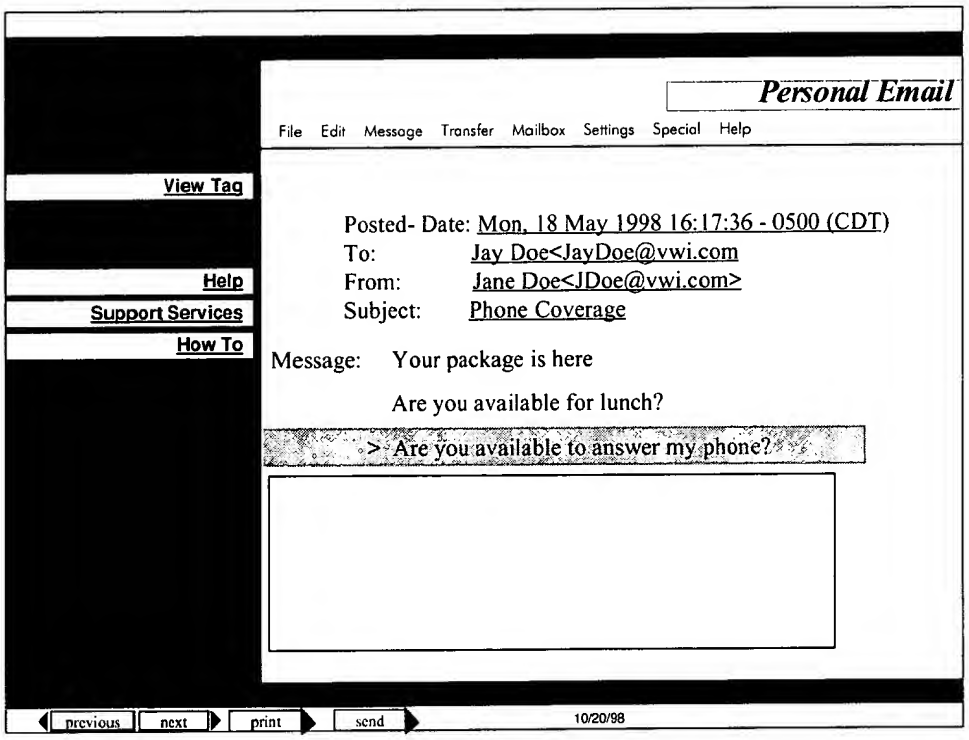
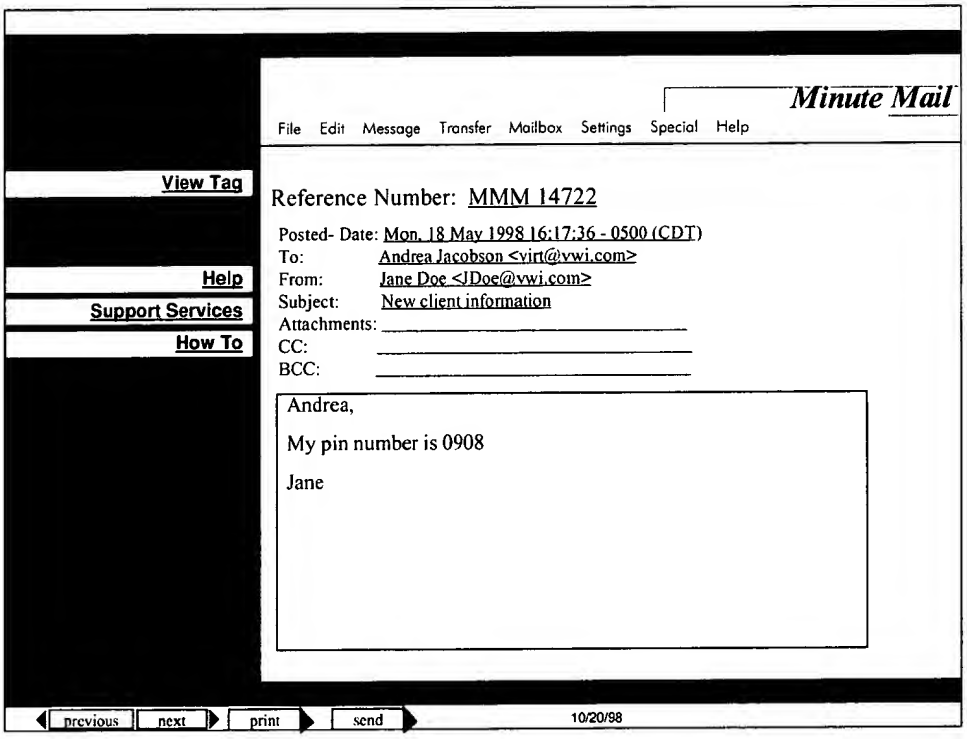

Business Email
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Reference Number: BEM 14722
Posted- Date: Mon, 18 May 1998 16:17:36 - 0500 (CDT)
To: Andrea Jacobson <virt@vwi.com>
From: Jane Doe <JDoe@vwi.com>
Subject: New client information
Attachments:
CC:
BCC:
Andrea,
I am sending you info on our new client.
See attached file.
Jane
previous
next
print
send
10/20/98

Figure 10


Personal Email
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Posted- Date: Mon, 18 May 1998 16:17:36 - 0500 (CDT)
To: Jay Doe<JayDoe@vwi.com
From: Jane Doe<JDoe@vwi.com>
Subject: Phone Coverage
Message: Your package is here
Are you available for lunch?
> Are you available to answer my phone?
previous
next
print
send
10/20/98

MAIN MENU
EXIT

Figure 11


Minute Mail
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Reference Number: MMM 14722
Posted- Date: Mon, 18 May 1998 16:17:36 - 0500 (CDT)
To: Andrea Jacobson <virt@vwi.com>
From: Jane Doe <JDoe@vwi.com>
Subject: New client information
Attachments:
CC:
BCC:
Andrea,
My pin number is 0908
Jane
previous
next
print
send
10/20/98

MAIN MENU
EXIT

Figure 12

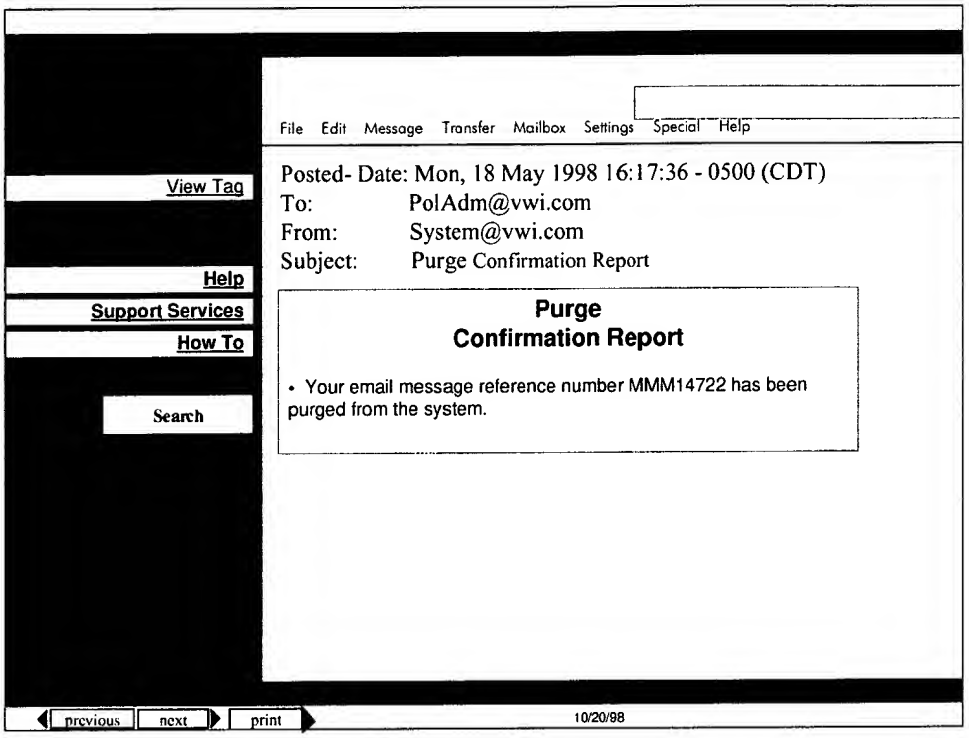

File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Search
Posted- Date: Mon, 18 May 1998 16:17:36 - 0500 (CDT)
To: PolAdm@vwi.com
From: System@vwi.com
Subject: Purge Confirmation Report
Purge
Confirmation Report
• Your email message reference number MMM14722 has been purged from the system.
previous
next
print
10/20/98

Figure 13

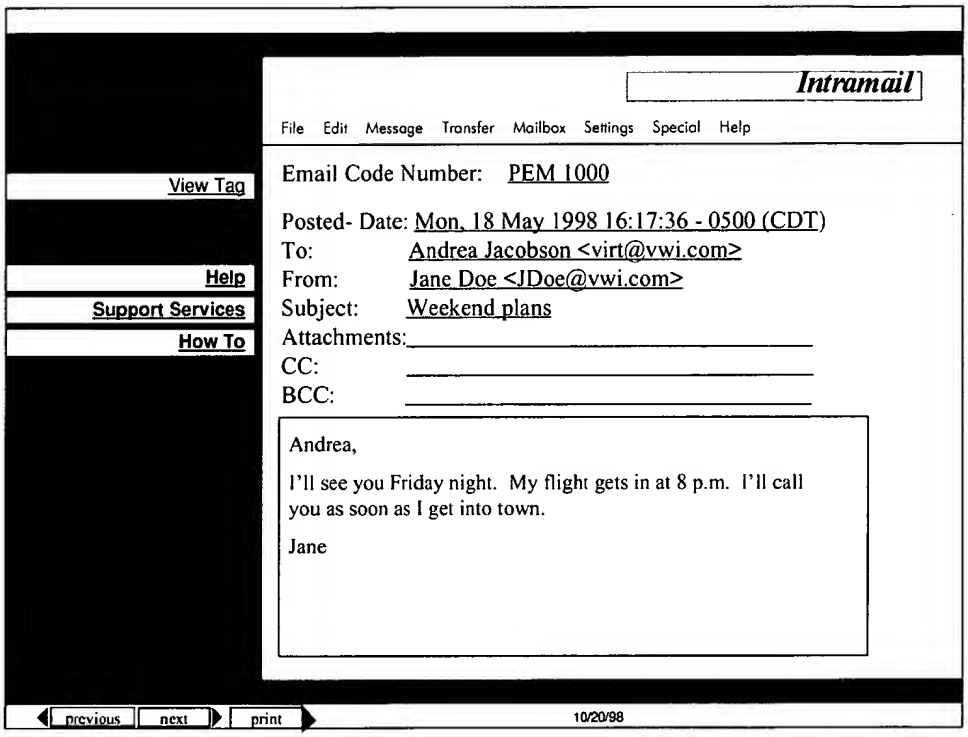

Intramail
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Email Code Number: PEM 1000
Posted- Date: Mon, 18 May 1998 16:17:36 - 0500 (CDT)
To: Andrea Jacobson <virt@vwi.com>
From: Jane Doe <JDoe@vwi.com>
Subject: Weekend plans
Attachments:
CC:
BCC:
Andrea,
I'll see you Friday night. My flight gets in at 8 p.m. I'll call you as soon as I get into town.
Jane
previous
next
print
10/20/98

Figure 14

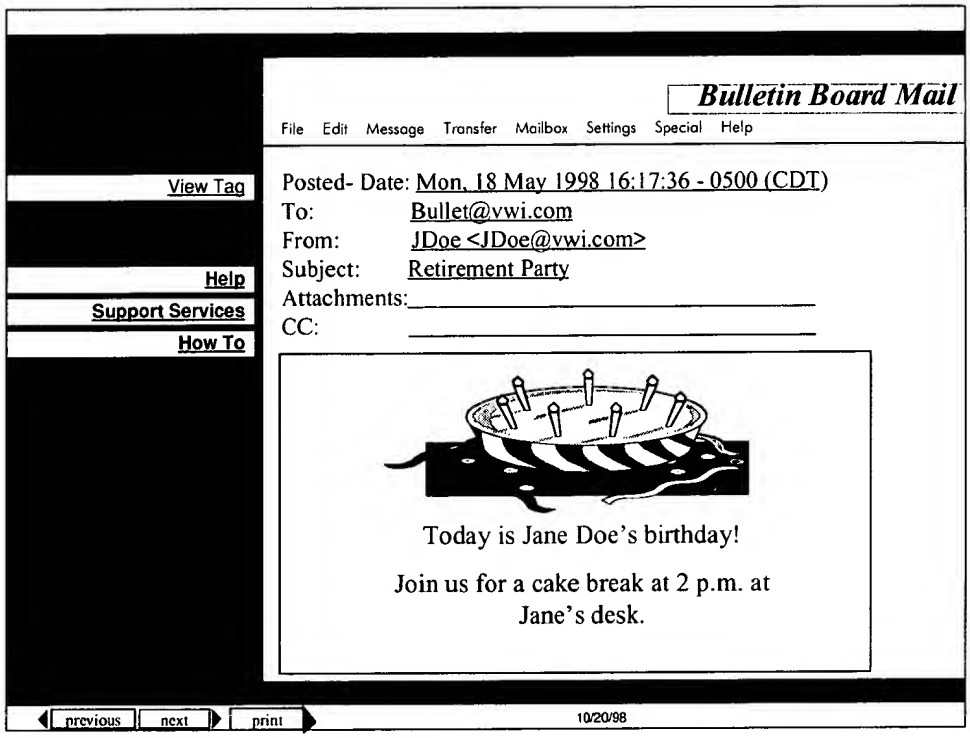

Bulletin Board Mail
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Posted- Date: Mon, 18 May 1998 16:17:36 - 0500 (CDT)
To: Bullet@vwi.com
From: JDoe <JDoe@vwi.com>
Subject: Retirement Party
Attachments:
CC:
Today is Jane Doe's birthday!
Join us for a cake break at 2 p.m. at Jane's desk.
previous
next
print
10/20/98

Figure 15

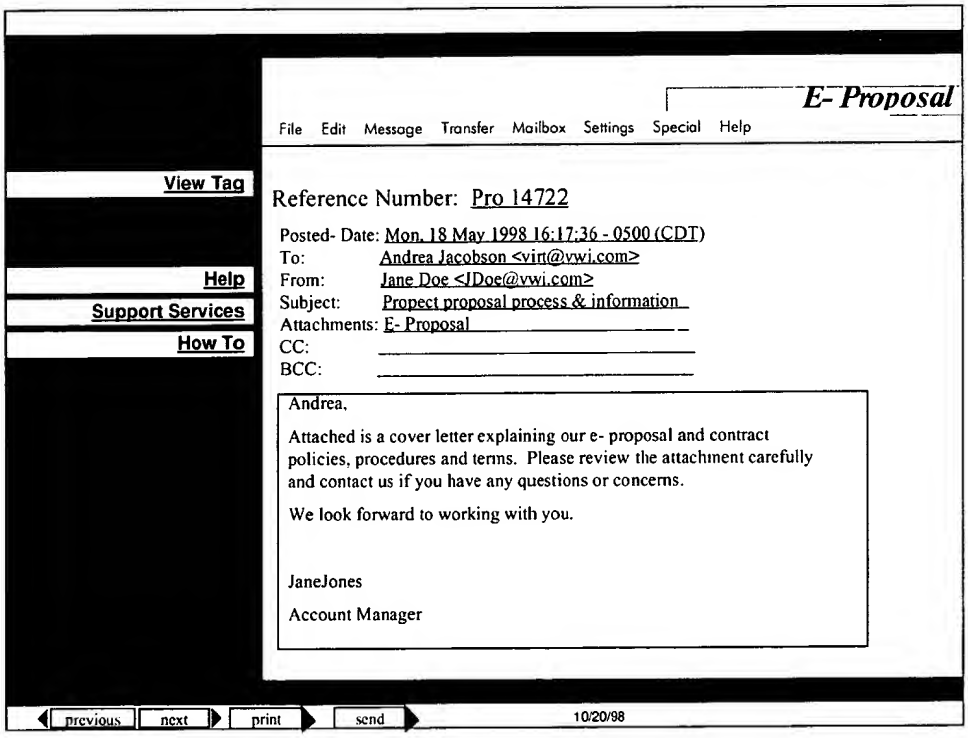

E- Proposal
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Reference Number: Pro 14722
Posted- Date: Mon, 18 May 1998 16:17:36 - 0500 (CDT)
To: Andrea Jacobson <virt@vwi.com>
From: Jane Doe <JDoe@vwi.com>
Subject: Propect proposal process & information
Attachments: E- Proposal
CC:
BCC:
Andrea,
Attached is a cover letter explaining our e- proposal and contract policies, procedures and terms. Please review the attachment carefully and contact us if you have any questions or concerns.
We look forward to working with you.
JaneJones
Account Manager
previous
next
print
send
10/20/98

Figure 16

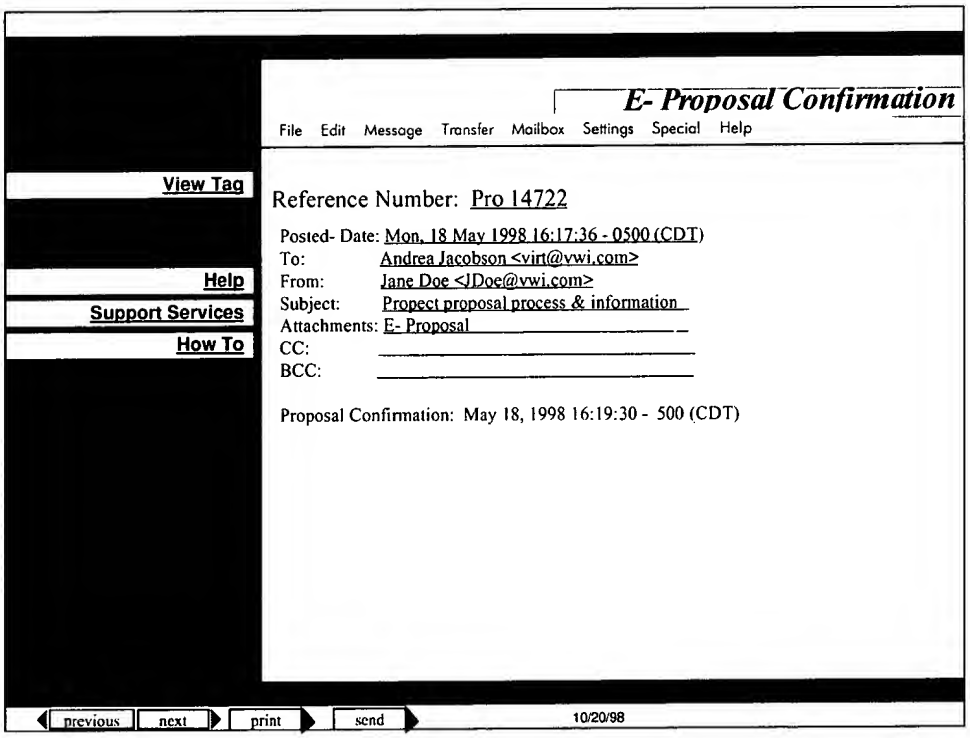

E- Proposal Confirmation
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Reference Number: Pro 14722
Posted- Date: Mon, 18 May 1998 16:17:36 - 0500 (CDT)
To: Andrea Jacobson <virt@vwi.com>
From: Jane Doe <JDoe@vwi.com>
Subject: Propect proposal process & information
Attachments: E- Proposal
CC:
BCC:
Proposal Confirmation: May 18, 1998 16:19:30 - 500 (CDT)
previous
next
print
send
10/20/98

Figure 17

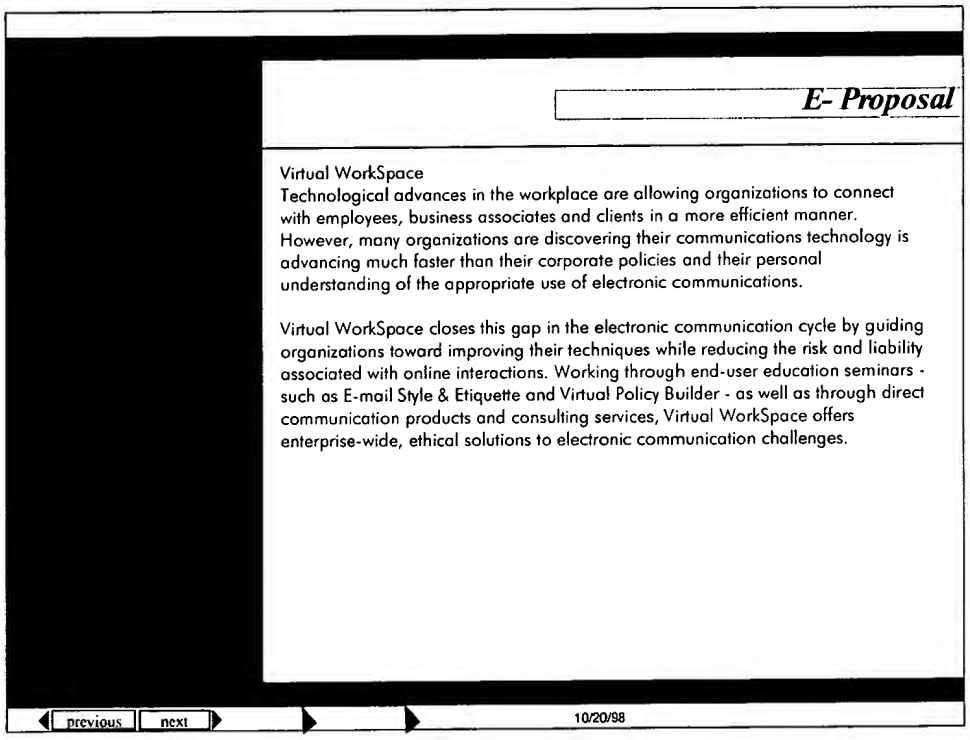

E- Proposal
Virtual WorkSpace
Technological advances in the workplace are allowing organizations to connect with employees, business associates and clients in a more efficient manner. However, many organizations are discovering their communications technology is advancing much faster than their corporate policies and their personal understanding of the appropriate use of electronic communications.
Virtual WorkSpace closes this gap in the electronic communication cycle by guiding organizations toward improving their techniques while reducing the risk and liability associated with online interactions. Working through end-user education seminars - such as E-mail Style & Etiquette and Virtual Policy Builder - as well as through direct communication products and consulting services, Virtual WorkSpace offers enterprise-wide, ethical solutions to electronic communication challenges.
previous
next
10/20/98

Figure 18

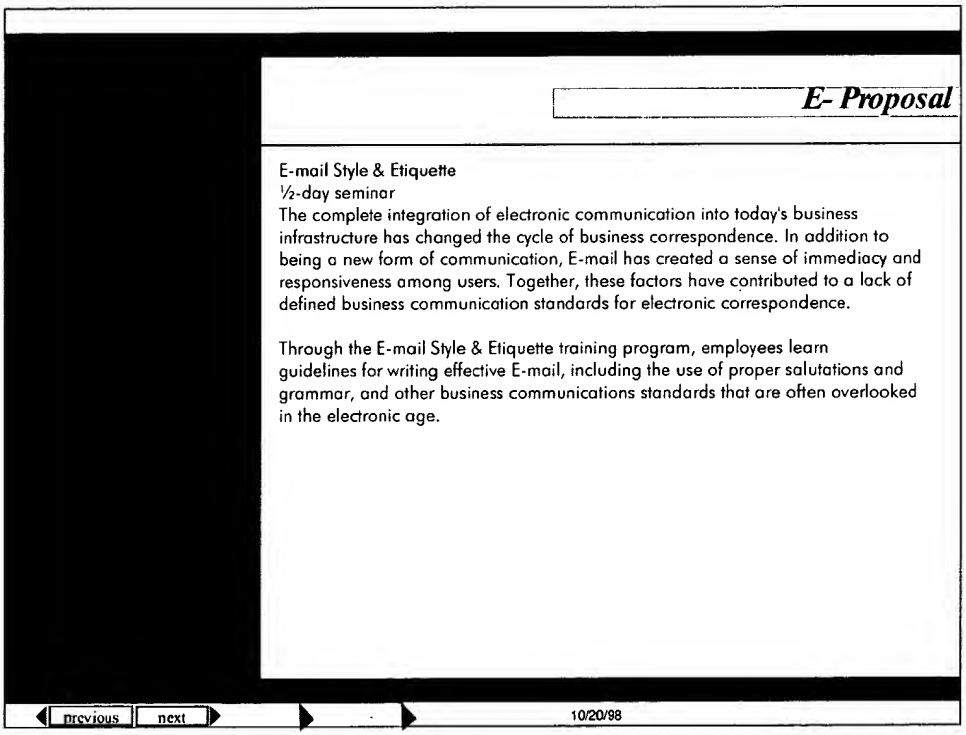

E- Proposal
E-mail Style & Etiquette
½-day seminar
The complete integration of electronic communication into today's business infrastructure has changed the cycle of business correspondence. In addition to being a new form of communication, E-mail has created a sense of immediacy and responsiveness among users. Together, these factors have contributed to a lack of defined business communication standards for electronic correspondence.
Through the E-mail Style & Etiquette training program, employees learn guidelines for writing effective E-mail, including the use of proper salutations and grammar, and other business communications standards that are often overlooked in the electronic age.
previous
next
10/20/98

Figure 19

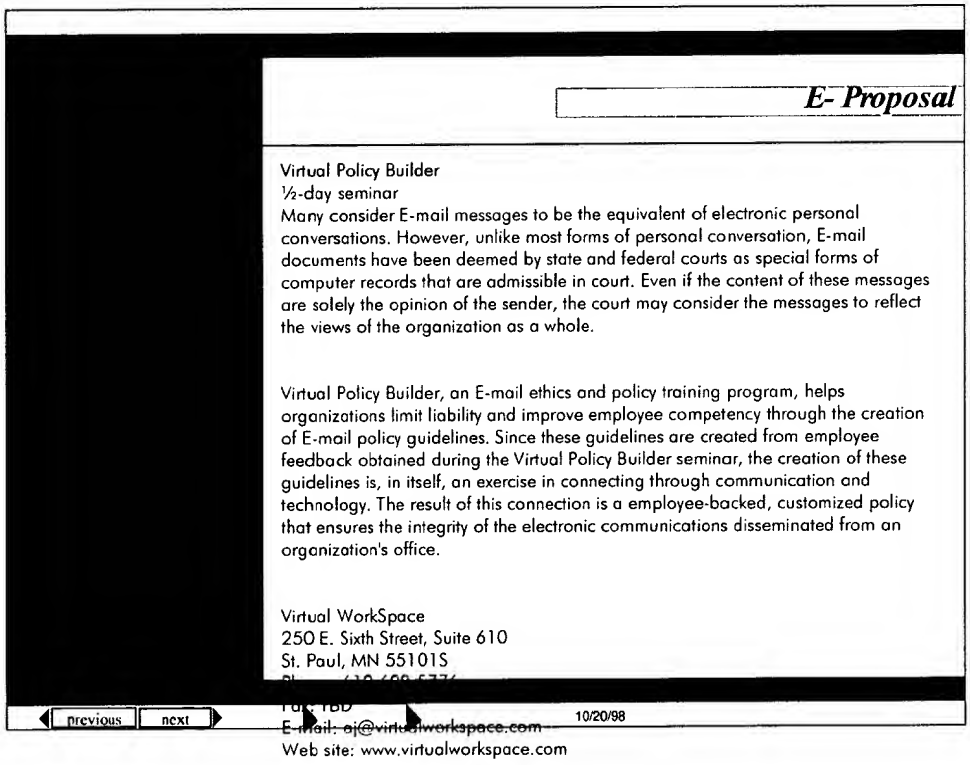

E- Proposal
Virtual Policy Builder
½-day seminar
Many consider E-mail messages to be the equivalent of electronic personal conversations. However, unlike most forms of personal conversation, E-mail documents have been deemed by state and federal courts as special forms of computer records that are admissible in court. Even if the content of these messages are solely the opinion of the sender, the court may consider the messages to reflect the views of the organization as a whole.
Virtual Policy Builder, an E-mail ethics and policy training program, helps organizations limit liability and improve employee competency through the creation of E-mail policy guidelines. Since these guidelines are created from employee feedback obtained during the Virtual Policy Builder seminar, the creation of these guidelines is, in itself, an exercise in connecting through communication and technology. The result of this connection is a employee-backed, customized policy that ensures the integrity of the electronic communications disseminated from an organization's office.
Virtual WorkSpace
250 E. Sixth Street, Suite 610
St. Paul, MN 55101S
Fax: TBD
E-mail: aj@virtualworkspace.com
Web site: www.virtualworkspace.com
previous
next
10/20/98

Figure 20

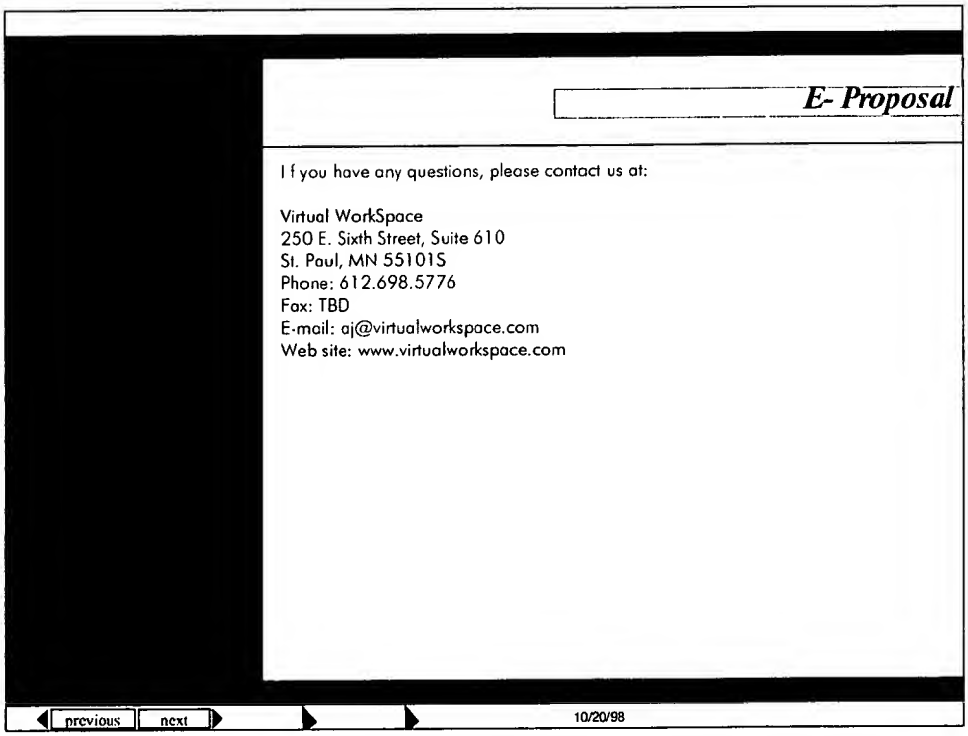

E- Proposal
I f you have any questions, please contact us at:
Virtual WorkSpace
250 E. Sixth Street, Suite 610
St. Paul, MN 55101S
Phone: 612.698.5776
Fax: TBD
E-mail: aj@virtualworkspace.com
Web site: www.virtualworkspace.com
previous
next
10/20/98

Figure 21

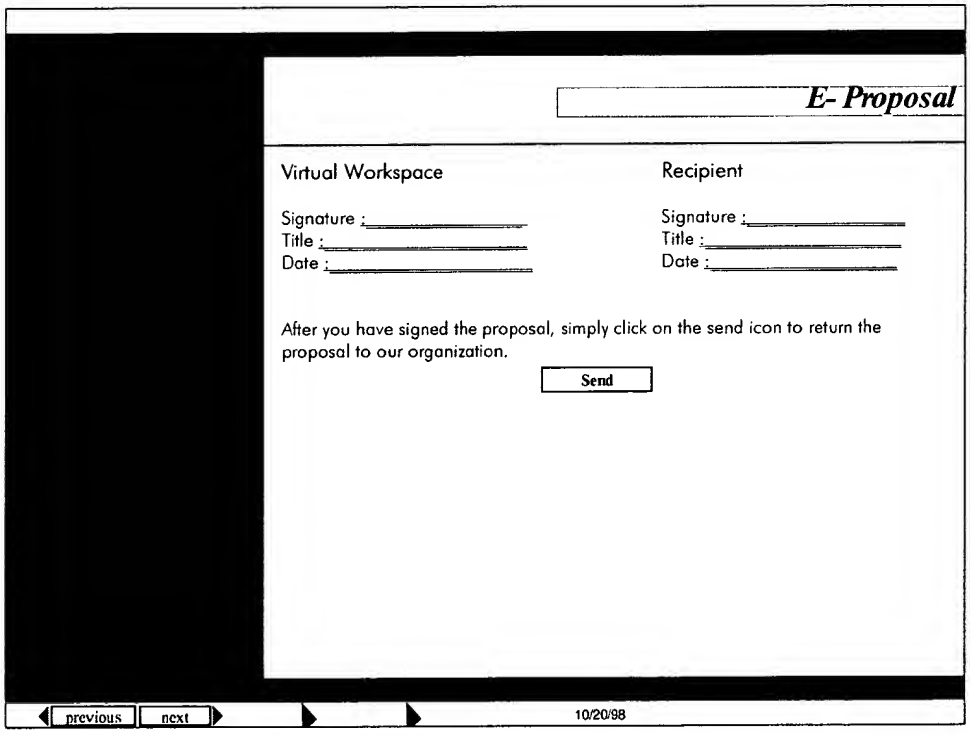

E- Proposal
Virtual Workspace
Signature :
Title :
Date :
Recipient
Signature :
Title :
Date :
After you have signed the proposal, simply click on the send icon to return the proposal to our organization.
Send
previous
next
10/20/98

Figure 22

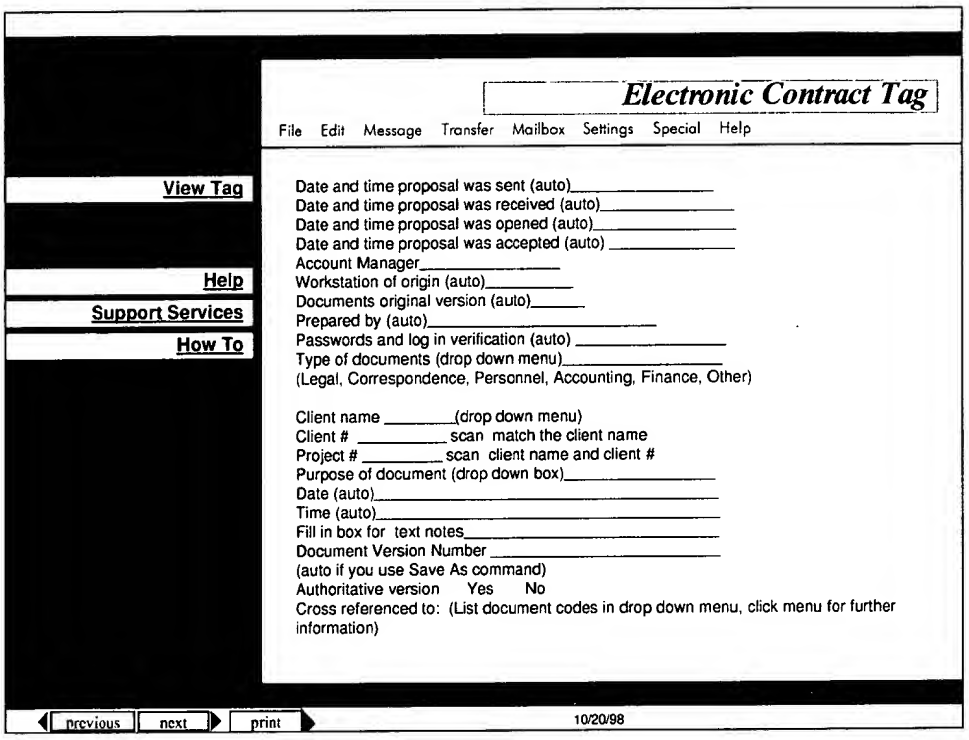

Electronic Contract Tag
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Date and time proposal was sent (auto)_____
Date and time proposal was received (auto)_____
Date and time proposal was opened (auto)_____
Date and time proposal was accepted (auto) _____
Account Manager_____
Workstation of origin (auto)_____
Documents original version (auto)_____
Prepared by (auto)_____
Passwords and log in verification (auto) _____
Type of documents (drop down menu)_____
(Legal, Correspondence, Personnel, Accounting, Finance, Other)
Client name _____(drop down menu)
Client # _____ scan match the client name
Project # _____ scan client name and client #
Purpose of document (drop down box)_____
Date (auto)_____
Time (auto)_____
Fill in box for text notes_____
Document Version Number _____
(auto if you use Save As command)
Authoritative version Yes No
Cross referenced to: (List document codes in drop down menu, click menu for further information)
previous
next
print
10/20/98

Figure 23

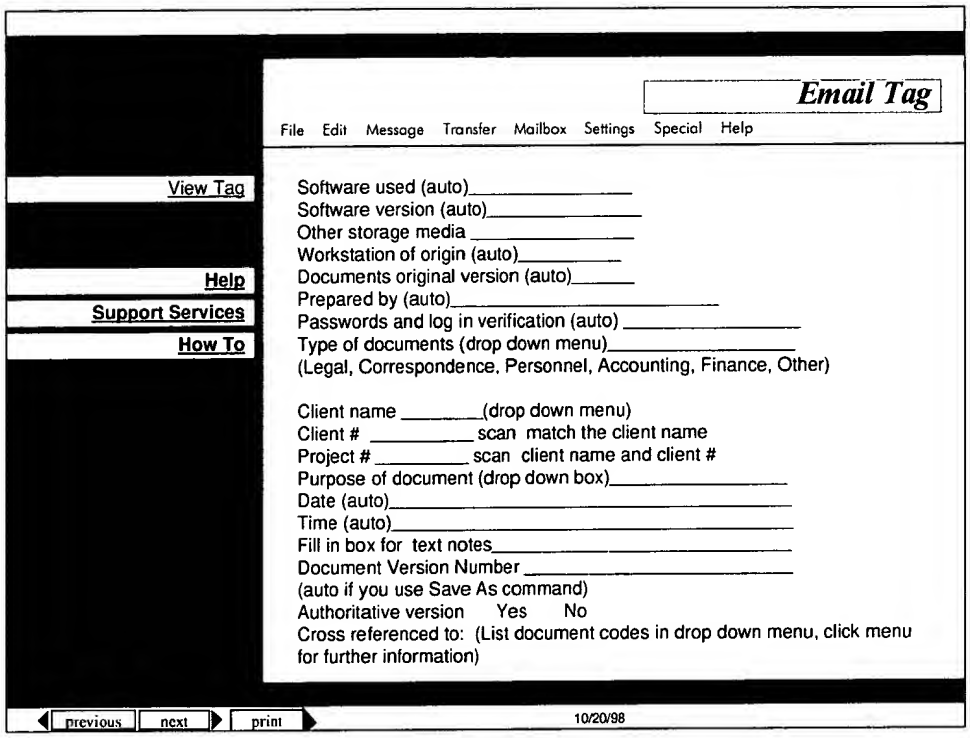

Email Tag
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Software used (auto)_____
Software version (auto)_____
Other storage media _____
Workstation of origin (auto)_____
Documents original version (auto)_____
Prepared by (auto)_____
Passwords and log in verification (auto) _____
Type of documents (drop down menu)_____
(Legal, Correspondence, Personnel, Accounting, Finance, Other)
Client name _____(drop down menu)
Client # _____ scan match the client name
Project # _____ scan client name and client #
Purpose of document (drop down box)_____
Date (auto)_____
Time (auto)_____
Fill in box for text notes_____
Document Version Number _____
(auto if you use Save As command)
Authoritative version Yes No
Cross referenced to: (List document codes in drop down menu, click menu for further information)
previous
next
print
10/20/98

Figure 24

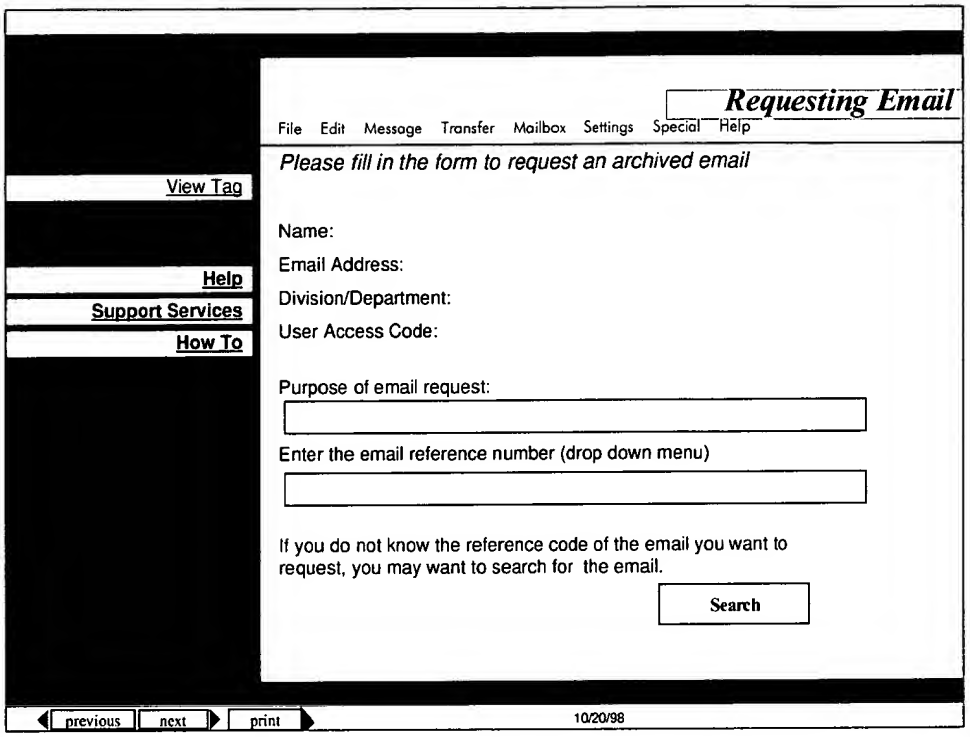

Requesting Email
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Please fill in the form to request an archived email
Name:
Email Address:
Division/Department:
User Access Code:
Purpose of email request:
Enter the email reference number (drop down menu)
If you do not know the reference code of the email you want to request, you may want to search for the email.
Search
previous
next
print
10/20/98

Figure 25

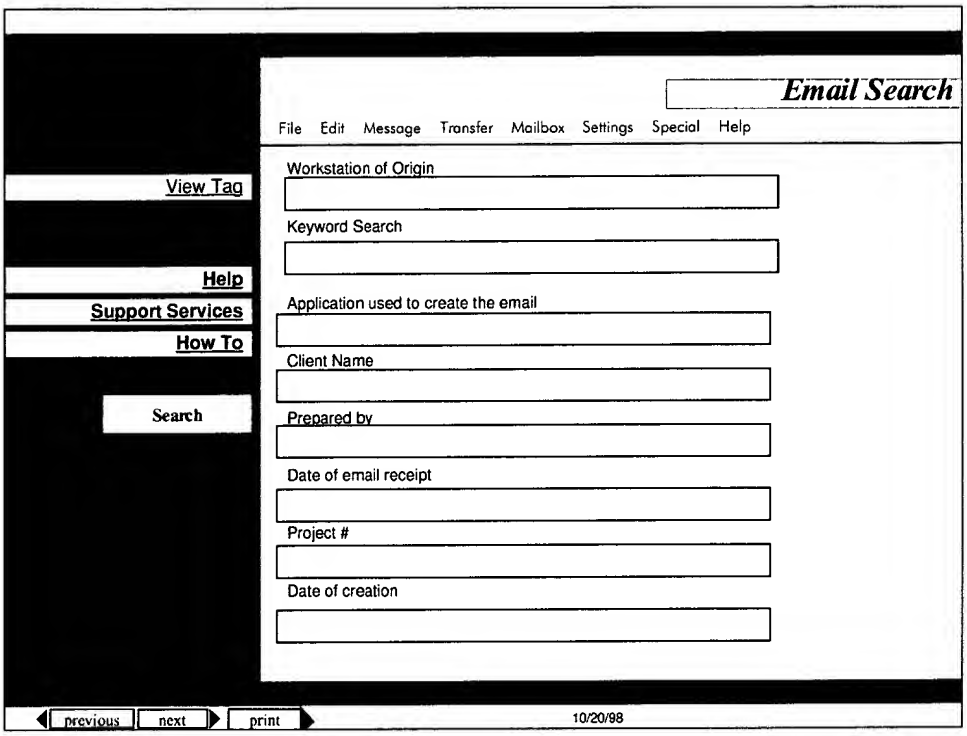

Email Search
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Search
Workstation of Origin
Keyword Search
Application used to create the email
Client Name
Prepared by
Date of email receipt
Project #
Date of creation
previous
next
print
10/20/98

Figure 26

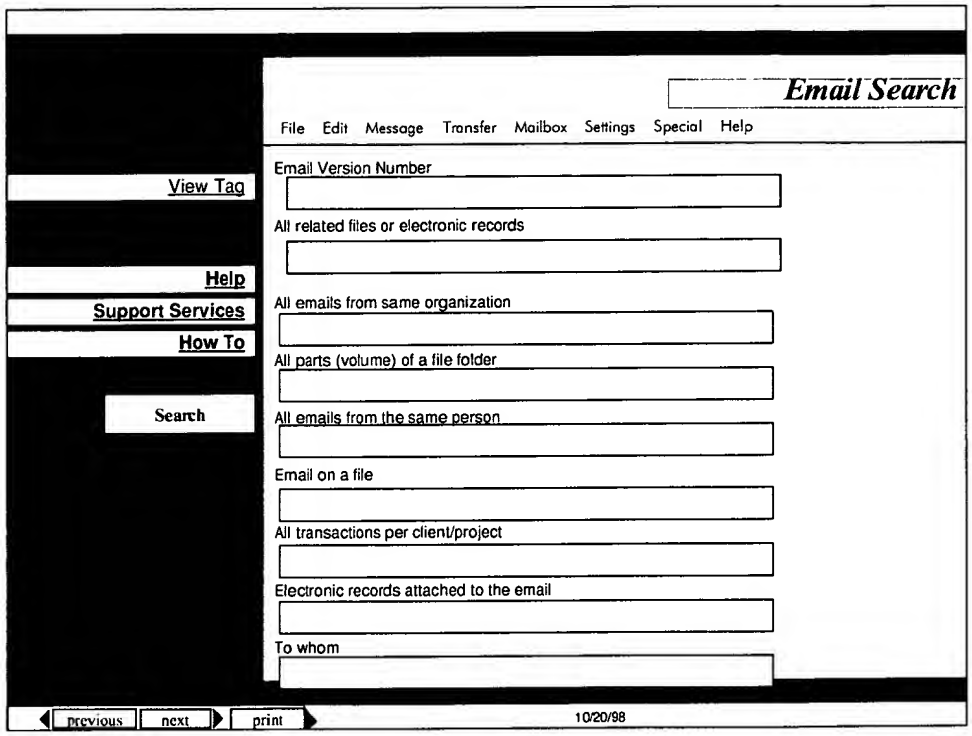

Email Search
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Search
Email Version Number
All related files or electronic records
All emails from same organization
All parts (volume) of a file folder
All emails from the same person
Email on a file
All transactions per client/project
Electronic records attached to the email
To whom
previous
next
print
10/20/98

Figure 27

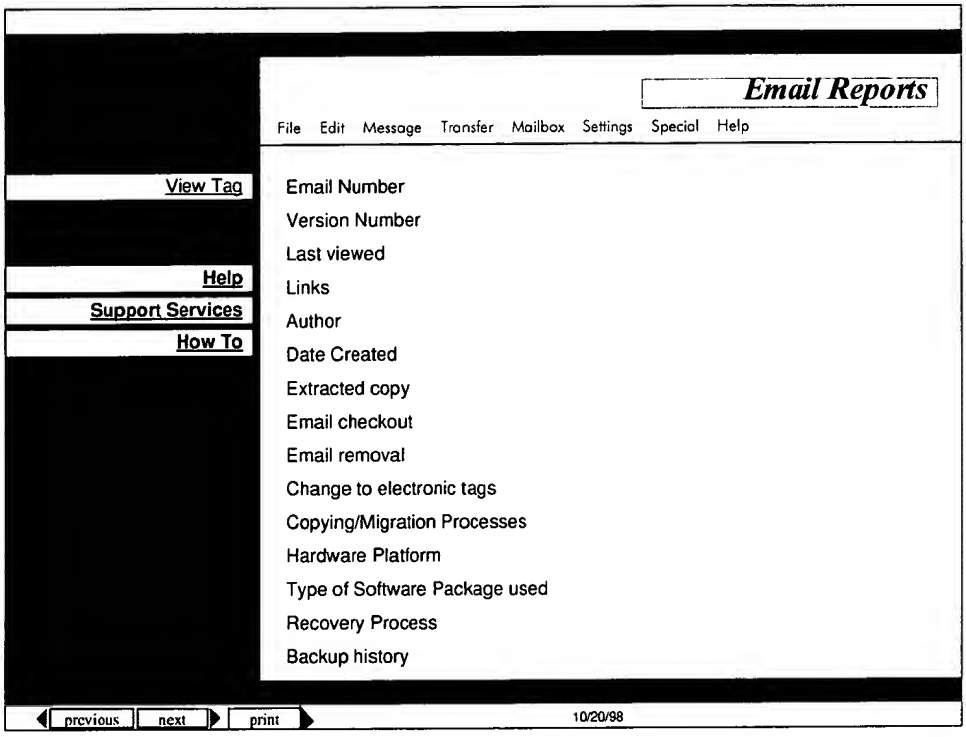

Email Reports
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Email Number
Version Number
Last viewed
Links
Author
Date Created
Extracted copy
Email checkout
Email removal
Change to electronic tags
Copying/Migration Processes
Hardware Platform
Type of Software Package used
Recovery Process
Backup history
previous
next
print
10/20/98

Figure 28

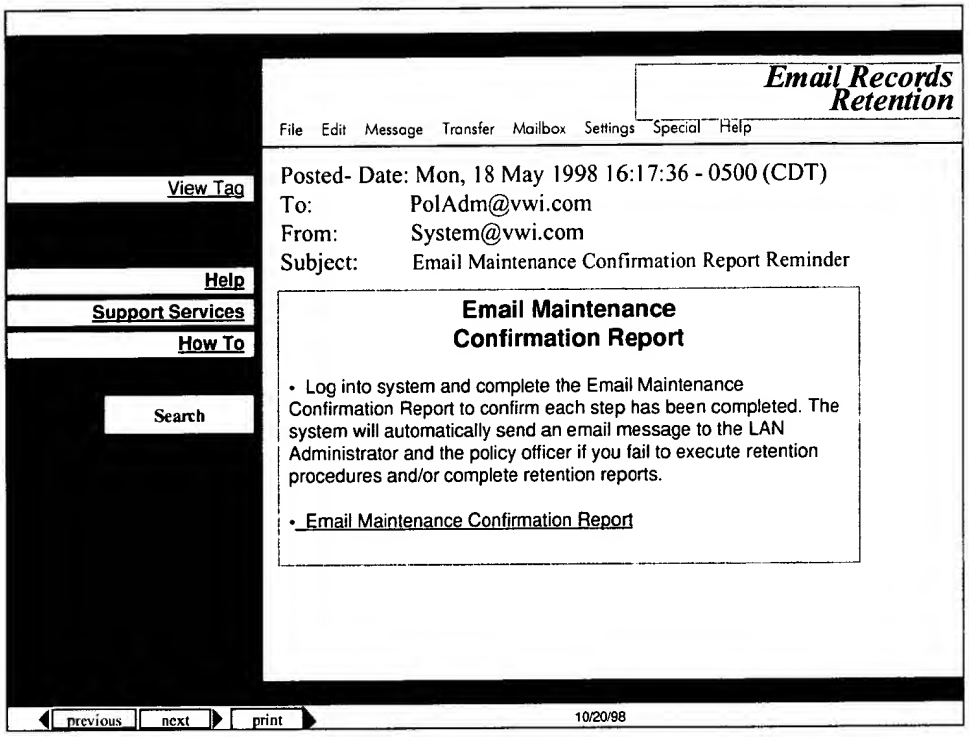
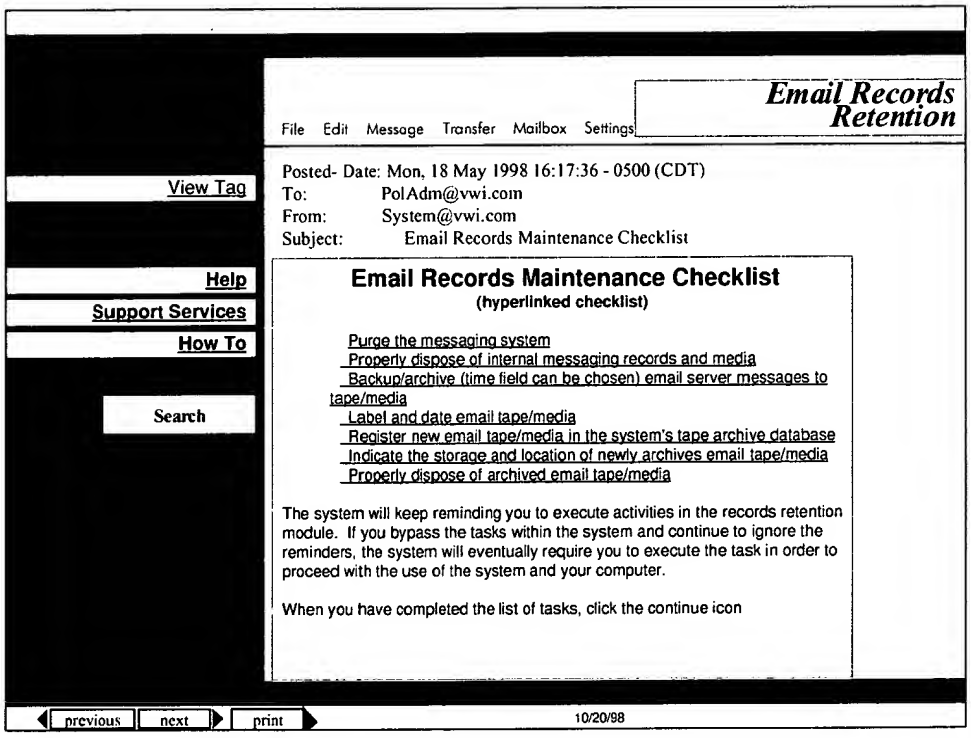

Email Records Retention
File Edit Message Transfer Mailbox Settings Special Help
View Tag
Help
Support Services
How To
Search
Posted- Date: Mon, 18 May 1998 16:17:36 - 0500 (CDT)
To: PolAdm@vwi.com
From: System@vwi.com
Subject: Email Maintenance Confirmation Report Reminder
Email Maintenance Confirmation Report
• Log into system and complete the Email Maintenance Confirmation Report to confirm each step has been completed. The system will automatically send an email message to the LAN Administrator and the policy officer if you fail to execute retention procedures and/or complete retention reports.
• Email Maintenance Confirmation Report
previous
next
print
10/20/98

Figure 29


File Edit Message Transfer Mailbox Settings
Email Records Retention
View Tag
Help
Support Services
How To
Search
Posted- Date: Mon, 18 May 1998 16:17:36 - 0500 (CDT)
To: PolAdm@vwi.com
From: System@vwi.com
Subject: Email Records Maintenance Checklist
Email Records Maintenance Checklist
(hyperlinked checklist)
Purge the messaging system
Properly dispose of internal messaging records and media
Backup/archive (time field can be chosen) email server messages to tape/media
Label and date email tape/media
Register new email tape/media in the system's tape archive database
Indicate the storage and location of newly archives email tape/media
Properly dispose of archived email tape/media
The system will keep reminding you to execute activities in the records retention module. If you bypass the tasks within the system and continue to ignore the reminders, the system will eventually require you to execute the task in order to proceed with the use of the system and your computer.
When you have completed the list of tasks, click the continue icon
previous
next
print
10/20/98